

Approval Flows

Approval flows are system generated based on the user's designated management level, or amount they are allowed to purchase before a supervisor is added to their eRequisition. Some state agencies also have approval flows generated based on the commodity code selected for the item on the eRequisition (e.g., IT commodity). The approval flow for an eRequisition can be seen on the Approval Flow tab on the Checkout page. Users cannot modify their standard approval flow; however, they can add additional approvers.

Note: Not all agencies use the approval flow functionality. Some LEA's will continue to approve eRequisitions in their designated financial system.

The screenshot shows the Ariba Spend Management interface. The user is logged in as Thomas Woods. The page title is 'PR254: Untitled Requisition' with 'Items: 2' and a 'Total: \$7,300.00USD'. The 'Checkout' tab is selected in the left sidebar. In the main content area, the 'Approval Flow' tab is highlighted with a dashed circle. Below the tabs, there are fields for 'Title' (Untitled Requisition), 'On Behalf Of' (Thomas Woods), and 'Delay Purchase Until'. A table of 'Line Items' is displayed below, showing two items: HP OmniBook Laptop 7150 - Pentium 4 3GHz 1gb ... with quantities of 1 each, priced at \$3,750.00USD and \$3,550.00USD respectively.

No.	Type	Description	Qty	Unit	Price	Amount
1		HP OmniBook Laptop 7150 - Pentium 4 3GHz 1gb ...	1	each	\$3,750.00USD	\$3,750.00USD
2		HP OmniBook Laptop 7150 - Pentium 4 3GHz 1gb ...	1	each	\$3,550.00USD	\$3,550.00USD

1. To view the approval flow for the eRequisition, click the Approval Flow tab from the Checkout page. The Approval Flow tab is displayed.

The screenshot displays the Ariba Spend Management interface. The top navigation bar includes 'Home', 'Help', and 'Logout' buttons. The user 'Thomas Woods' is logged in. The main area shows the 'Checkout' step for 'PR254: Untitled Requisition' with 'Items: 2' and a total of '\$7,300.00USD'. The 'Approval Flow' section is active, showing a 'Legend' with icons for 'Pending', 'Active', 'Approved', 'Denied', and 'Watcher'. Below the legend, a flow diagram shows 'PR254' being sent to 'Buyer Administrator' with a 'Pending' status. A yellow callout box points to the 'Legend' and states: 'The 'Legend' graphically depicts approver status.' Another yellow callout box points to the 'Buyer Administrator' status and states: 'The status in this example is 'Pending'. The eRequisition has not been submitted and sent to the approver's approval queue.'

- Click the **'Add Approver'** button to add additional approvers to the existing approval flow. Approvers added by the original requestor can be added in parallel. Approvers added by another approver can be added as the first or subsequent approver.

Note: The Legend indicates the status of the eRequisition as it moves through the approval flow.

- Pending:** Indicates the eRequisition has not been sent to the approver for approval.
- Active:** Indicates the eRequisition is currently in the approver's approval queue awaiting approval.
- Approved:** Indicates the eRequisition has been approved by the designated approver.
- Denied:** Indicates the request has been denied by the approver. The user should review the comments section of the eRequisition for comments added by the approver indicating why the request was denied.
- Watcher:** Indicates the approver in the approval flow is optional. A watcher's approver is not required on the eRequisition for it to be fully approved.

The screenshot shows the 'Checkout' step of the requisition process. On the left is a navigation pane with 'Add Title', 'Add Items', and 'Checkout' (highlighted). The main area is titled '3 Checkout' and 'Requisition'. Below the title bar are tabs for 'Summary' and 'Approval Flow'. The 'Approval Flow' tab is active, showing 'Approval Flow - Requisition'. It includes a 'Select Approver' dropdown menu, a 'Select Approval List' link, and radio buttons for 'Approver' (selected) and 'Watcher'. A 'Provide a reason:' text box is below. A legend shows status icons: Pending, Active, Approved, Denied, and Watcher. Below the legend, a flow diagram shows 'PR254' leading to 'Buyer Administrator' with an 'Approved' status. At the bottom are 'OK' and 'Cancel' buttons.

3. Select the desired approver in the '**Add Approver to approval flow**' dropdown box. If the approver's name does not appear in the dropdown box, select '**Other...**' to search for the designated approver.

Note: Purchase & Contract or ITS must be manually added to the approval flow for eRequisitions over agency delegation. This can be done by the requestor or a subsequent approver. For non-IT purchases over agency delegation, the State Purchase and Contract Approver must be added to the end of the flow. For IT purchases over agency delegation, the Statewide IT Procurement Approver must be added to the end of the approval flow. Both the State Purchase and Contract Approver and the State IT Procurement Approver can be located by searching on the word '**State**'. Be certain to select State IT Procurement Officer and NOT the ITSS Chief Procurement Officer.

Note: Approvers can also be added as watchers. A watcher will receive the eRequisition in their approval queue but is their approval is not required for the eRequisition to proceed in the approval flow.

Note: Only approvers that have been manually added to the approval flow can be deleted. The user that manually added the approver must be the one to delete them.

4. Users may also add an approver list when adding approvers to an eRequisition. To do so, click the '**Select Approver List**' link.
5. Search for the desired approvers by entering the approver name in the '**Name**' field and clicking the '**Search**' button.

Choose Values for Add approver to approval flow [OK] [Cancel]

Currently Selected

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	CORR Approver 01
<input checked="" type="checkbox"/>	CORR Approver 07

Add to Currently Selected

Field: Name [Search]

<input type="checkbox"/>	Name
<input type="checkbox"/>	Approver with Same Name as Approver in Another Entity
<input checked="" type="checkbox"/>	CORR Approver 01
<input checked="" type="checkbox"/>	CORR Approver 02
<input checked="" type="checkbox"/>	CORR Approver 03
<input type="checkbox"/>	CORR Approver 04

6. Place a checkmark in the checkbox beside each approver to be added and click the **'OK'** button.
7. Select whether the approvers are required or optional. Click the **'OK'** button.

eRequisition [Shopping Cart Icon]

PR82A323: Untitled eRequisition
 Items: 2 Total: \$183.35USD [Prev] [Submit] [Exit]

3 Checkout eRequisition

Summary Approval Flow

Approval Flow - eRequisition

Legend: ☐ Pending ☐ Active ☒ Approved ☐ Denied ☐ Watcher

PR82A323

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  graph LR
    A[CORR Approver 11] --> B[CORR Purchasing Agent]
    B --> C[Approved]
    D[CORR Approver 01] -.-> A
    E[CORR Approver 02] -.-> A
  
```

[Add Approver] [Delete Approver]

New approver was added successfully.

[Prev] [Submit] [Exit]

8. Selected approvers are added to the flow.